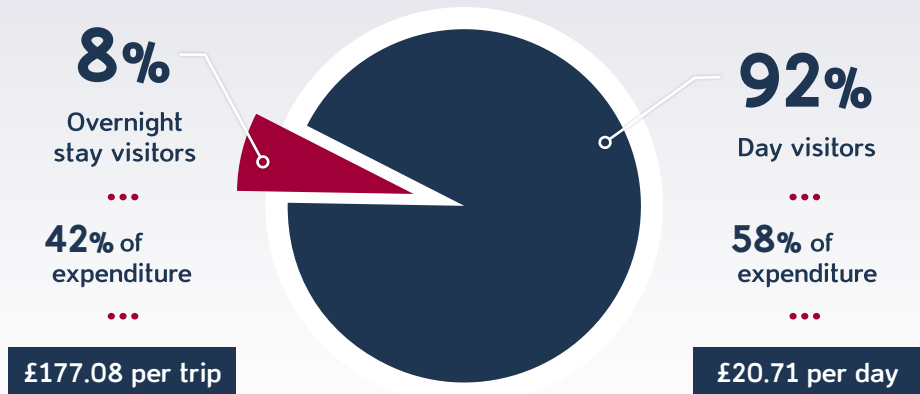


England's tourism sector is vibrant and vital and makes up over 80% of the UK's total visitor economy. Tourism generates £106 billion a year to the economy, employing 2.6 million people and supports thousands of businesses.

Visitors to Durham



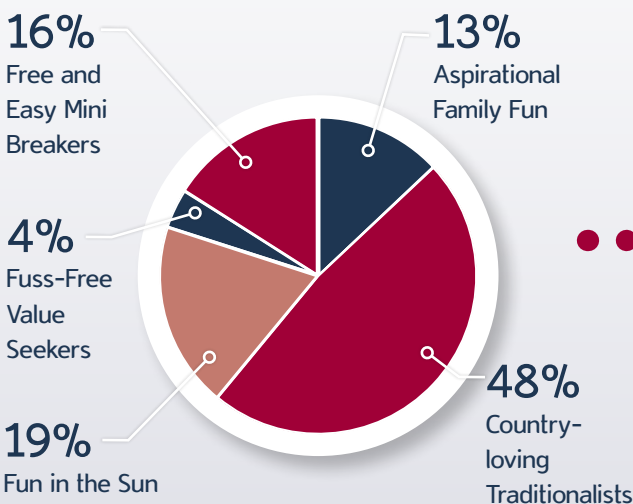
Source: STEAM 2017

Segmentation – visitor target groups

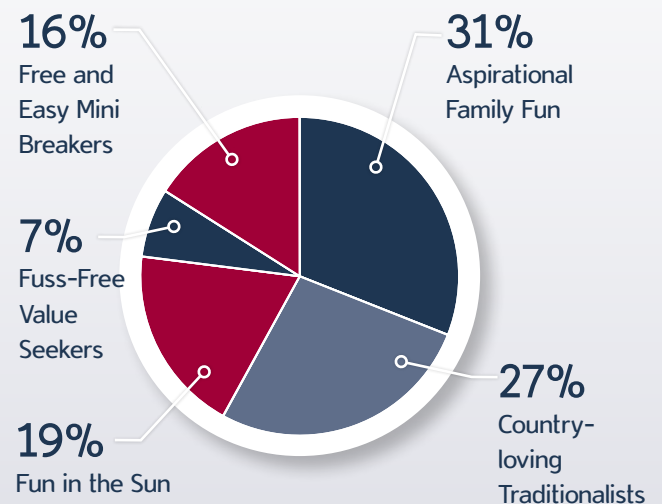
3 key markets for Durham

- Country-loving Traditionalists** – “Empty-nesters seeking a traditional rural break. Love unspoilt countryside, walking and visiting heritage attractions – and sampling local food and produce”. Moderate spenders but current high volume.
- Fun In The Sun** – “Beach-loving families with kids in tow. Travel in-season and prefer outdoor activities”. Low spenders but moderate current volume.
- Aspirational Family Fun** – “High-income and often London-based families who can afford to try a wide range of activities – and take more holidays than the other segments”. High spenders and moderate current volume.

Proportion of segments among current visitors



Proportion of wallet



Source: Kubi Kalloo Segmentation Report 2017

Visitor behaviour

2016 visitor survey results

- Since 2013 there has been an increase in the number of couples travelling to Durham.
- 1 in 5 visitors are visiting for the first time with half of those staying overnight on holiday being first time visitors.
- Strong local audience, providing opportunities for local ambassadors.
- Visitors are keen to see outdoor pursuits developed in rural areas.
- Visitors would like to see more retail and family friendly activities in the city.
- Heritage cities and rural destinations such as Yorkshire and Cotswolds are the main competitors when visitors are considering their travel options.
- Word of mouth (16%) and previous trips (61%) heavily influence visitor on choosing Durham. If we get the product right, visitors will return and they will promote the destination for us by word of mouth.
- Visitors are 12% less likely to book in the week prior to their visit, but 11% more likely to book 1-3 months prior to their visit.
- 35% of visitors are now booking on line, whereas the number of those booking by telephone has dropped.
- Satisfaction is high particularly in quality of attractions.
- Customer service in tourism facilities is regarded as high.
- Durham is perceived as 'better than expected' for almost half of visitors, but only 'as expected' by 53%.

Source: 2016 visitor survey



Economic Impact of the Visitor Economy

Durham



- Tourism is worth £867 million to Durham's economy (37% - food & drink, 14% - recreation, 10% - shopping, 8% - accommodation, 7% - transport, 25% indirect spend) from 19.7m visitors.
- 92% of all visits are for the day. Average day spend is £20.71, accounting for 58% of total expenditure.
- 8% of visitors stay overnight. Average spend per trip is £177.08, accounting for 42% of all expenditure.
- 11,682 jobs are supported by the visitor economy.

City of Durham



- Tourism is worth £216m to Durham City from 4.2 million visitors.
- 89% of all visits are for the day. Average day spend is £20.71, accounting for 49% of total expenditure.
- 11% of visitors stay overnight. Average spend per trip is £178.75, accounting for 51% of total expenditure.
- 2,760 jobs are supported by the visitor economy.

Durham Coast



- Tourism is worth £127m to the Durham Coast from 3.2m visitors.
- 94% of all visits are for the day. Average day spend is £20.71, accounting for 66% of total expenditure.
- 6% of visitors stay overnight. Average spend per trip is £163.27, accounting for 34% of total expenditure.
- 1,638 jobs are supported by the visitor economy.

Durham Dales



- Tourism is worth £157m to the Durham Dales from 2.6m visitors.
- 89% of all visits are for the day. Average day spend is £20.71, accounting for 41% of total expenditure.
- 11% of visitors stay overnight. Average spend per trip is £253.87, accounting for 59% of total expenditure.
- 2,396 jobs are supported by the visitor economy.

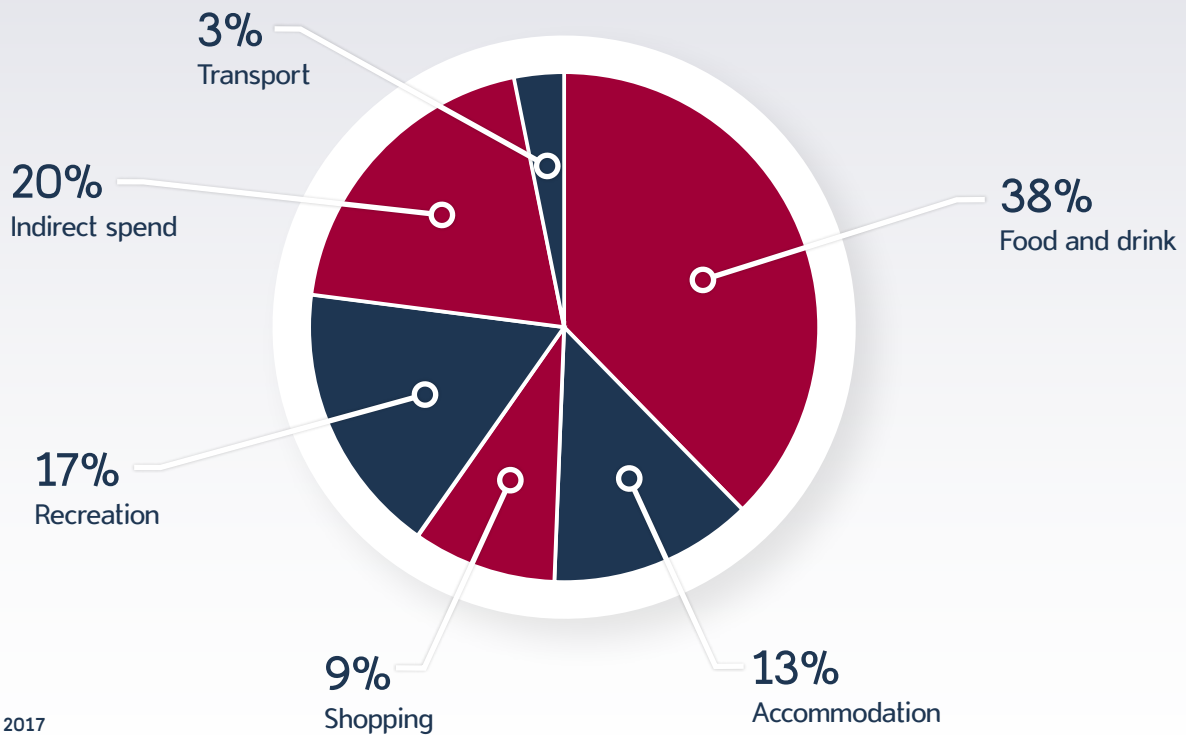
Vale of Durham



- Tourism is worth £364m to the Vale of Durham from 9.6m visitors.
- 94% of all visits are for the day. Average day spend is £20.71, accounting for 69% of total expenditure.
- 6% of visitors stay overnight. Average spend per trip is £144.55, accounting for 31% of total expenditure.
- 4,868 jobs are supported by the visitor economy.

Employment

Spending by the 19.7m visitors supports over 11,682 (FTEs) in the county of which there are over 9,350 are directly employed in tourism.



Source: STEAM 2017

Accommodation

There are 589 properties across the county providing 14,483 bed spaces.

Serviced

- 171 serviced properties
- 5,876 bed spaces
- 11 properties with more than 50 rooms, 35 with 11-50 rooms and 125 with fewer than 10 rooms

Caravan and camping

- 44 sites
- 3,704 pitches

Self-catering

- 363 properties
- 3,318 bed spaces

Youth hostels

- 11 properties
- 329 bed spaces

Source: STEAM 2016

2017 Occupancy

Establishment type	Average annual occupancy
Bed & Breakfasts	43%
Hotels	76%
Self-catering	58%

Source: T-stats occupancy data 2017

Data is representative and from businesses who have provided occupancy information.

Attractions

- Approximately 70 attractions both free and paid including landscape attractions.
- 15 attractions with VAQAS accreditation
- Over 6.1 million visits (2016)

Attraction	2017 Visitor numbers
Beamish Museum	797,203
Durham Cathedral	638,338*
Hamsterley Forest	473,535
Hardwick Park	459,757
Locomotion	185,107
Palace Green Library	149,399
The Oriental Museum	89,951
WHS Visitor Centre	79,286
The Bowes Museum	76,144
Bowlees Visitor Centre	46,873
Auckland Castle	36,281*
Raby Castle	33,938
Durham Castle	31,380
Diggerland	27,842
Crook Hall & Gardens	22,694
Barnard Castle	24,254
The Botanic Gardens	17,021

* 2016 visitor numbers

Source: annual attraction figures (t-stats) – 2016 & 2017



The Conference Market

- 585,000 delegates annually
- £55 million to Durham economy (excluding social events)
- Estimated 1,293 supported jobs.
- 66% day conferences and 28% residential business
- 40% corporate
- 34% public sector
- 26% association
- 72% from within the North East

Source: Durham Conference Feasibility Study 2012

The value of the 'This Is Durham' website

- £5,239,711 additional spend is injected into Durham's economy as a result of the website whilst supporting 89 jobs.
- 76% used the website more than once
- 71% used the website to source information when planning a trip
- 12% used the website both before and during a trip
- 85% rated the website as very good and excellent
- 66% of users (from outside of Durham) said that the information they found on thisisdurham.com definitely turned a possible visit into a certainty and of those 21% decided to stay longer.
- 44% found the website via web search with Durham in mind whilst 12% used social media (84% of these via Facebook)
- 95% of users were either likely or very likely to reuse the website

Source: Website evaluation 2017

Website Traffic 2017 (this is durham.com)

1,006,785 unique users

Traffic sources



Desktop
31.11%



Mobile
49.75%



Tablet
19.14%

The value of The Durham Pocket Guide

- 58% of respondents who used the guide were from out of the area.
- 46% of respondents had used the guide during their visit.
- 96% of respondents visited attractions that they had not planned to as a result of using the guide.
- 94% of respondents visited areas of the county they had not planned to as a result of using the guide.
- 73% of respondents spent more time in the county than they had not planned to as a result of using the guide.
- 62% of respondents spent more money in the county than they had not planned to as a result of using the guide.
- 62% of respondents visited a retailer that they had not planned to as a result of using the guide.
- 86% of those who used the guide used it to find out what to see and do.
- 96% of respondents rated the guide as good or very good.
- 79% of respondents who used the guide said they would be likely to return.
- 92% of respondents are likely to recommend Durham as a place to visit to a friend or colleague.

Source: Durham Pocket Guide evaluation 2017



Durham Cultural Tourism Offer

On a national level the arts and cultural sector generated a £15.8 billion turnover (a growth of over 9.5% since 2013). This rises to £20 billion when taking in to account the growth output of the entire arts and culture industry. The sector generates an estimated £8.5 billion of Gross Value Added (GVA). This gives 51p of GVA for every £1 of turnover generated and is now responsible for circa 0.45% of UK employment.

Source: Contribution of the arts and cultural industry to the national economy (Arts Council England) 2017

Durham's Cultural Tourism offer;

- Circa £50 million annual expenditure
- Employs over 2,000 people
- Engages with over 100 apprentices
- Delivers 1,000s of volunteer experiences

Source: DCC Cultural Activity Impact Report 15 March 2017 and Durham County Council Evaluations of Events Programme 2017.

Event	Net economic impact	Total net impact composition Local Contract Spend	DCC contribution	Return on investment (before AVE)	Return on investment (including AVE)	Estimated number of visitors
Lumiere	£7,558,486	3%	58%	£600,000 525%	1260%	240,000
BRASS	£1,240,724	12%	25%	£120,500 769%	1030%	39,579
Durham Book Festival	£805,895	7%	77%	£75,000 246%	1075%	7,5365
BAFF	£526,70819	10%	Unavailable	£55,000 899%	956%	25,000
Tour Series Cycling	£174,222	4%	9%	£71,632 220%	243%	11,0004

Lumiere 2017

- 240,000 visitors
- 29 art installations
- Total economic impact £4.9million
- 4 evenings
- 315 volunteers

The Ashes Test Match 2013

- 5 days play
- Estimated £20m injection into the region
- 70 jobs (FTE's) rose to nearly 600 over the period
- 70,000 spectators

Source: Ashes Test at Durham County Cricket Club 2013

Kynren 2016

- 100,000 spectators across 15 performances
- 23% of visitors were from outside of the North East.
- 90% definitely or very likely to return

Source: : Eleven Arches Kynren evaluation summer 2016

Flying Scotsman and the Great Goodbye (2016)

Arguably the county's most successful exhibition to date, the Great Goodbye attracted more than 100,000 visitors over nine days, with a further 50,000 people attending the Flying Scotsman event

Yves Saint Laurent Exhibition at The Bowes Museum (2015)

The first UK retrospective of the designers work attracting over 70,000 visitors to Teesdale and making a significant contribution to the 6% growth in tourism in the area for 2015.



All figures have been rounded to the nearest whole number where relevant. Please contact us for exact figures.